## Web Based Application

- Why web based?
  - Less determination of first-come, first-serve
    - In bill
    - Paper vs e-file
    - Post mark date vs date of completing credit pre-approvals
  - Easy identification of the donors
    - Follow the tax credit into our system
  - Electronic transmission to our tax system
    - Little if any data entry
  - Provides an expectation of the amount of donations
  - Good mechanism to monitor the credit limits (\$3,000,000)
  - Statute allows for its creation



We can't stopmature; but wexcan make it a little easier to handle

# Montana Natural Disaster Tax Relief

Click Here for Information on How to Apply

#### What's New at Revenue?

Natural Disaster Tax Relief Become a State Trainer Current Year Tax Forms

#### Faxpayer Access Point

TAP Login
File my Return
Where's my Refund?
File W2 - 1099
Tax Certificates
TAP Help

#### Other Resources

Administrative Rules
Montana Income Tax Express
MontanaFreeFile.org
Montana License Lookup
ePay Options
ePass Montana
eStop Business Licenses
Education Donations Portal
Identity Theft and Fraud Prevention
Information

Home Help Contact

#### **Welcome to the Montana Education Donations Portal**

The Education Donations Portal allows individuals to:

- Donate to the innovative educational programs for public schools and preapprove the tax credit
- Preapprove a tax credit for a donation to a student scholarship organization for private schools
- · Retrieve a lost or forgotten confirmation code for your tax return

The Education Donations Portal allows Student Scholarship Organizations to:

- · File an application with the Department of Revenue
- · Submit an annual fiscal review to the department

You must setup an ePass account to access this service. If you do not have an ePass account, you may create one by clicking on the ePass link to the right.



▶ Login using ePass Montana

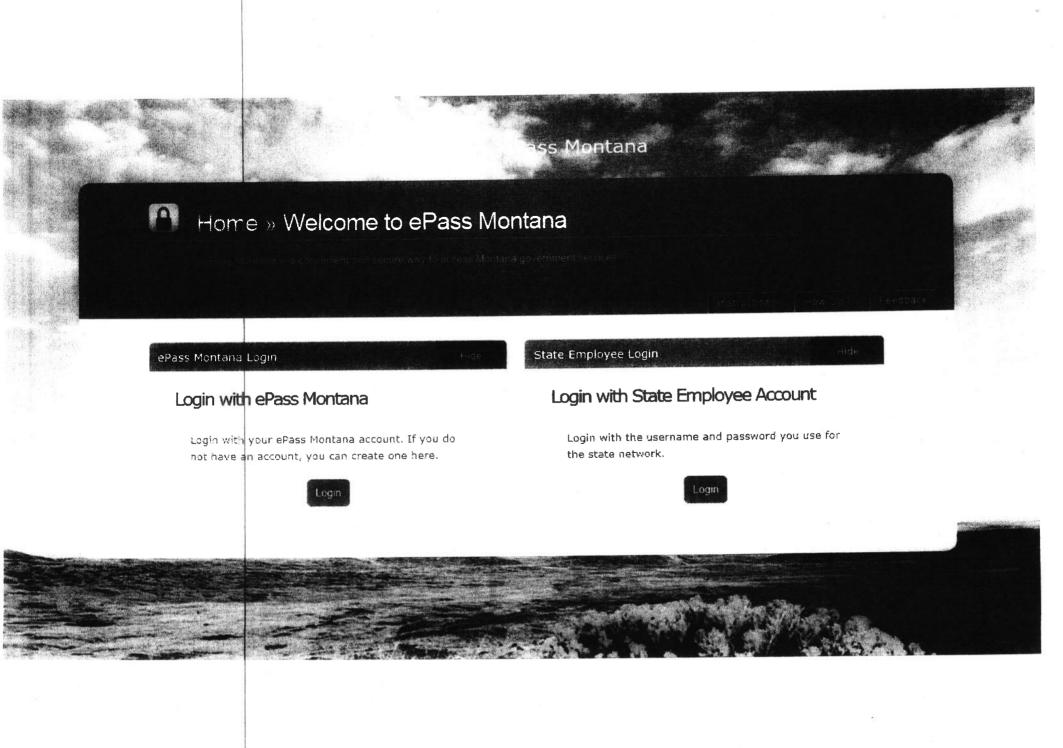
#### **Remaining Tax Credits**

Select on SEC for compact info

**Innovative Educational Program:** \$ 2,996,408.00 **Student Scholarship Organization:** \$ 2,996,600.00

To find contact information for a Student Scholarship Organization, you can select a SSO from the drop down below:

Privacy & Security



# **Education Donations Portal** Home Menu Help Contact ePass Montana Home Log Off Main Menu Donate Get Code My Info Student Scholarship Organizations use only: Submit Review

	Hom	е Мепи	Search	Financials	Admini	stration	Help Contact	ePass Mon	itana Home	e Log	
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Menu Search Financials Administration Contact ePass Montana Home Log Off неи **Innovative Education Program Donations** Instructions: Remaining Tax Credits You may donate more than the tax credit cap amount **Innovative Educational Program:** \$ 2.998,485.00 You may divide your donation among as many regions Student Scholarship Organization: \$ 2.998.502.00 and large districts as you like · For donations to large districts, you may choose to donate to either the high school district or elementary My Tax Credits and Donations Tax Credit Cap: If you choose "residence based", your donation will go to \$ 150.00 the region or large district based upon your physical Tax Credits Claimed: \$ 0.00 **Total Donations:**  To view a map of regions and districts Click Here 5 0.00 You will not receive the listed tax credits until you proceed and pay the total amount on the following screens. \* Add New Donation Refresh Region/District Name Donation Amount | Tax Credit Amount Credit Code Date No donations pending payment Select an Option: Back To Personal Information Back To Main Menu Privacy & Security

Administration Help Contact ePass Montana Home Log Off Home Menu Search Linancials **Innovative Education Program Donations** Remaining Tax Credits Instructions: Innovative Educational Program: \$ 2,998,488.00 · You may donate more than the tax credit cap amount · You may divide your donation among as many regions Student Scholarship Organization: 5 2,998,502.00 and large districts as you like · For donations to large districts, you may choose to My Tax Credits and Donations donate to either the high school district or elementary school district Tax Credit Cap: \$ 150.00 . If you choose "residence based", your donation will go to Tax Credits Claimed: 5 0.00 the region or large district based upon your physical Total Donations: \$ 0.00 . To view a map of regions and districts Click Here You will not receive the listed tax credits until you proceed and pay the total amount on the following screens. 2 Refresh j >C , New Donation No der Region/District Name\*: Butte High School District Amount: ---- Large School Districts ----Billings Elementary School District Billings High School District Insert | Cancel Bozeman Elementary School District Bozeman High School District \* If [Residence Based] is significant Elementary School District Buttle High School District Rathead High School District Great Fails Elementary School District Great Falis High School District Helena Elementary School District Helena High School District Kalispell Elementary School District Missoula Elementary School District Missoula High School District --- Regions - County ---Region 1 - Flathead Lake and Lincoln Counties Region 2 - Blaine, Hill and Phillips Counties Region 3 - Daniels Roosevelt Sheridan and Valley Counties Region 4 - Dawson Garfield McCone, Prairie, Richland and Wibaux Counties Region 5 - Cascade, Fergus, Golden Valley, Judith Basin, Musselshell, Petroleum and Wheatland Counties Region 6 - Mineral Missoula Ravalli and Sanders Counties Region 7 - Beaverhead Deer Lodge Granite Jefferson Madison, Powell and Silver Bow Counties

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Contact ePass Montana Home Log Off Administration Help Home Menu Search Financials **Innovative Education Program Donations** Instructions: **Remaining Tax Credits Innovative Educational Program:** \$ 2,998,385.00 · You may donate more than the tax credit cap amount You may divide your donation among as many regions Student Scholarship Organization: \$ 2,998,502.00 and large districts as you like For donations to large districts, you may choose to My Tax Credits and Donations donate to either the high school district or elementary Tax Credit Cap: \$ 150.00 . If you choose "residence based", your donation will go to Tax Credits Claimed: 5 100.00 the region or large district based upon your physical **Total Donations:** 5 100,00 . To view a map of regions and districts Click Here You will not receive the listed tax credits until you proceed and pay the total amount on the following screens. Refresh Add New Donation Region/District Name Donation Amount **Tax Credit Amount Credit Code** Date ELIGIBLE AMOUNT 07/11/2016 / X Butte High School District 5100

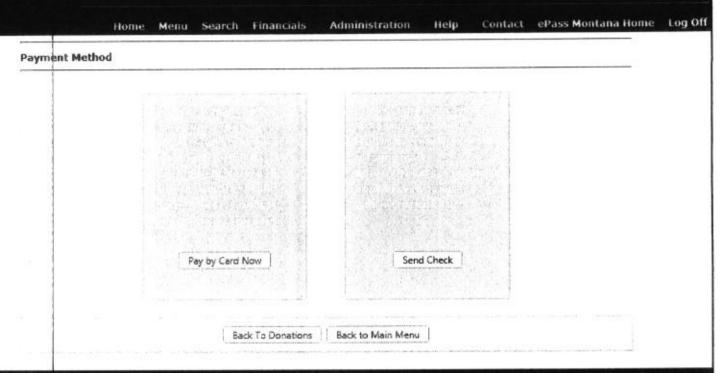
#### Confirm and Continue

Donations must be confirmed and paid before being eligible for qualifying tax credits.

#### Select an Option:

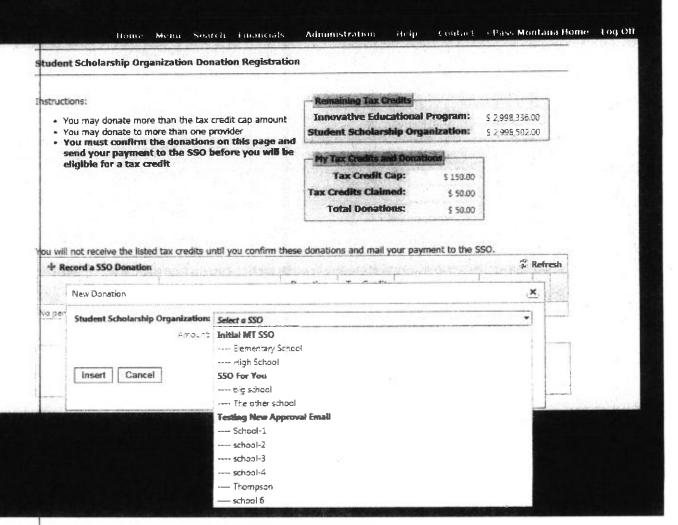
Back To Personal Information

Back To Main Menu



Privacy & Security

	Hon	ne Menu	Search	Financials	Admini	stration	Help Contact	ePass Montana Home	Log		
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Home Menu Search Financials Administration Help Contact ePass Montana Home Log Off

#### Student Scholarship Organization Donation Registration

#### Instructions:

- . You may donate more than the tax credit cap amount
- · You may donate to more than one provider
- You must confirm the donations on this page and send your payment to the SSO before you will be eligible for a tax credit

#### Remaining Tax Credits

Innovative Educational Program: \$ 2,998,335.00 Student Scholarship Organization: \$ 2,998,402.00

#### My Tax Credits and Donations

Tax Credit Cap: \$ 150,00
Tax Credits Claimed: \$ 150,00

Total Donations: \$ 550.00

You will not receive the listed tax credits until you confirm these donations and mail your payment to the SSO.

Record a SSO Dona	ation				8	Refre	<u>esh</u>
sso	Provider	Donation Amount	Tax Credit Amount	Credit Code	Date		
Initial MT SSC	Initial MT SSO	5500	5100	PARTIAL CREDIT	07/11/2016	1	25

#### **Confirm and Continue**

Donations must be confirmed before being eligible for qualifying tax credits.

#### Select an Option:

Back To Personal Information

Back To Main Menu